

# CourtLink® eFile

## **QUICK GUIDE:**

**NEW CASE FILING** 

The Fileroom Quick Guide provides a convenient source of information to help you efficiently file a new case electronically.

## **Quick Tips Before You Begin**

- 1. Refer to the appropriate court rules on electronic filing prior to using CourtLink® eFile to ensure you are in compliance with local requirements. Copies of the rules can be found on www.lexisnexis.com/courtlink under Courts Online/CourtLink eFile or within the CourtLink eFile application under Support.
- Service of Original Summons and Complaints, Petitions and other new case information must be done traditionally once a case is opened and accepted by the Court Clerk's office. Additional information is available from LexisNexis<sup>TM</sup> CourtLink<sup>®</sup> on this service of process. Please contact your account manager if you require additional details.
- 3. **Help** is available on the top right of each screen. When on any page of myCases, File & Serve, and Search Filings, click the **Help** button.
- 4. Check our system requirements on **www.lexisnexis.com/courtlink** to be sure your computer is correctly configured for using CourtLink eFile.
- 5. CourtLink eFile is divided into 3 separate areas. Become familiar with the functions of the 3 main areas to help you navigate through the application:
  - a. File & Serve Where you send documents to the court and opposing counsel.
  - b. Fileroom Where you retrieve documents and new service information
  - c. Information Desk Where you maintain personal, firm and case status information
- 6. All tables are sortable. Any time a grid or table appears, click the column headings to sort by that information.
- 7. Hyperlinks take you to additional information don't forget to use them!
- 8. When running searches, less is more. Only enter partial information to get the most results.
- 9. The fastest way to access a filing is with a Filing ID.
- 10. When using CourtLink eFile for the first time, or if you need assistance contact our Customer Support team at 1-888-529-7587.

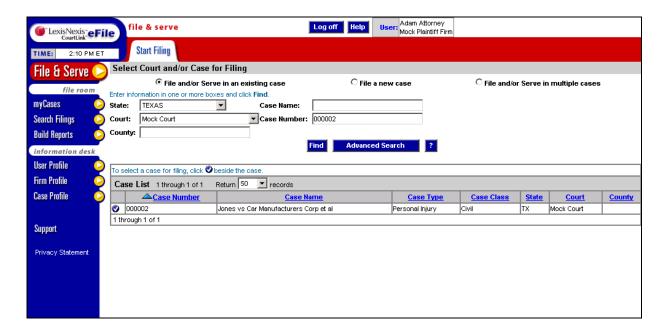
## **HOW TO LOG ON TO CourtLink eFile**

- 1. Before using CourtLink eFile, you must have a user name and password. If you do not have these, contact our Customer Service.
- 2. Using Microsoft<sup>®</sup> Internet Explorer or Netscape<sup>®</sup> Navigator<sup>®</sup>, open your browser and go to www.lexisnexis.com/courtlink.
- 3. When the home page appears, Click **Logon** under CourtLink eFile. The CourtLink eFile *Log on* page appears.
- 4. Enter your assigned user name and password and click Submit. myCases will open.

## **FILE & SERVE: START FILING**

There are 5 easy steps to e-filing a new case via CourtLink eFile. Each of these steps is detailed in this Quick Guide:

- 1. **Start Filing** Allows you to select a case or cases to file into.
- 2. **Documents** Lets you select the type of document you are filing and attach your documents.
- 3. Case Parties Allows you to enter parties named in the case.
- 4. Review & Submit Review your work and submit to the court.

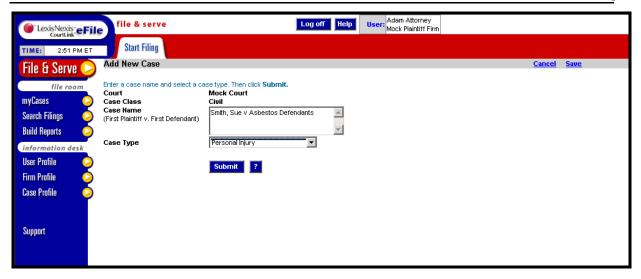


## START FILING

- 1. To begin the filing process, click **File & Serve**. The *Start Filing* tab appears.
- 2. To **File in a new case**, click the radio button titled *file a new case*.

Note: A new case is a case that does not have a case number assigned by a court clerk.

- 3. From the drop down menu, select the court in which you choose to file, click Find.
- 4. Courts accepting new cases electronically will appear in the list.
- 5. To select a court and case class (i.e. Civil, Domestic Relations, Probate, Water, etc), click the box to the left of the desired court name and class.
- 6. On the next screen, enter the **case name** and select the **case type** you are filing from the drop-down menu.



Tips for entering a case name:

- Only enter the abbreviated form of a case name. Do not list each party. (i.e. Smith, Sue v Asbestos Defendants)
- If the plaintiff is an individual, enter "last name, first name v. defendant name". Defendants do not need to be last name, first name.

#### Examples:

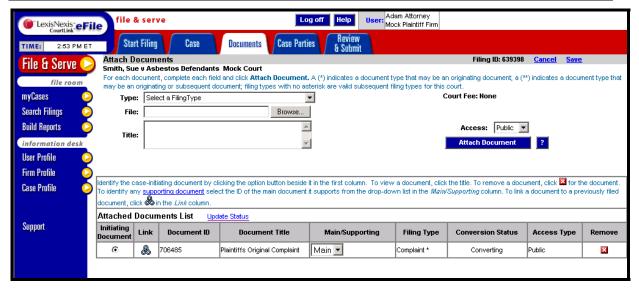
- Smith, Sue v. Asbestos Defendants et al
- Brown, Jack v. Bob White et al
- ABC Corporation v. Airline Industries et al

## **FILE & SERVE: DOCUMENTS**



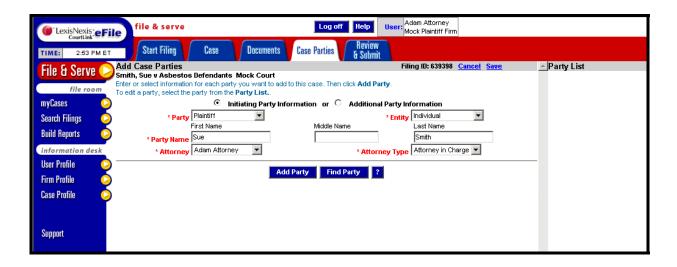
## SELECTING DOCUMENTS TO FILE

- 1. Select a filing type for your document from the **Type** drop down menu. Filing types with an asterisk (\*) denote acceptable filing types to open a new case. (i.e. Complaint, Petition)
- 2. Click the **Browse** button in the **File** section to browse your computer files and locate the document you are submitting.
- 3. Enter a title for your document in the **Title** field. The title must comply with local rules for electronic filing and should not contain any punctuation.
- 4. Next select an Access type for your filing, Public or Sealed:
  - a. **Public:** The document is a publicly filed instrument.
  - b. Sealed: The system only places a placeholder in the CourtLink eFile docket. You must deliver the actual document in hard copy to the court. Refer to your specific court rules to see if this is permissible.
- 5. Click Attach Document. The document will appear in the Attached Documents List.
- 6. To add more documents, repeat steps 1-5. The initiating document must be properly identified if you are filing more than one document in the transaction. Only the initiating document can open a new case.



- 7. When filing supporting document, use the Main/Supporting to reflect the document association. In the column by each supporting document, select the document ID for the main document to which it supports.
- 8. If you need to remove or replace a document, click the corresponding "\(\mathbb{\Z}\)" in the **Remove** column
- 9. When all documents have been attached and associated, click the *Case Parties* tab to continue.

## **FILE & SERVE: CASE PARTIES**



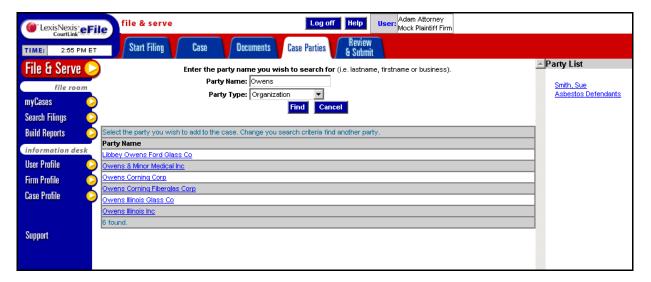
#### ADD INITIATING PARTIES TO CASE:

1. Select **Initiating Party Information** from the radio buttons. Initiating parties are the clients your office represents in the case. All required fields are red and asterisk (\*). Some courts require

additional information be provided. For example: Address Information, City, State and Zip. If those fields are required, then they will appear on your screen.

- 2. Select a **Party Type** from the drop-down menu.
- 3. Select an **Entity Type** from the drop-down menu (Individual or Organization).
- 4. Enter the party name in the fields available. (Note: In all Courts except Colorado, you should try to **Search** for party names to add to cases prior to entering them in manually to avoid duplicate entries, mis-spellings, etc. See steps to **Search for Party Names** below.)
- 5. Click **Add Party.** The party name appears under the **Party List**.
- 6. To add additional parties (parties other than the initiating party) Click Add New Party and proceed to next Section "Add Additional Parties".

## SEARCH FOR PARTY NAMES:



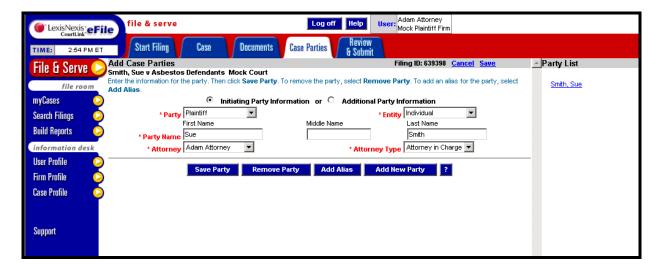
You should search for a party name in CourtLink eFile prior to entering it in. To search/find a party:

- Follow steps 1-4 above.
- Click Find Party and a Search Screen appears.
- Click the Entity Type to search and click Find.
- All parties with that name are displayed.
- If your party name is in the list, click on the name to select
- The party name is added to the name field under Case Parties.
- Click Save Party.
- To add another new party, click Add New Party.

**NOTE:** Party names are stored in CourtLink eFile using standard naming conventions. They serve as a placeholder only. Exact legal names, addresses, DOB and SS# information is not required nor stored for each party so that our clients have flexibility when searching for party names to add to the CourtLink eFile case parties lists. Your pleadings, however, should contain the

proper identification of parties sued. If you have any questions about the names or searching for names, please contact our Customer Service Center.

## ADD ADDITIONAL PARTIES TO CASE:



- To add additional parties to a case, select the Additional Party Information radio button.
   Additional parties are all parties that you are naming in the suit that are not represented by your office.
- 2. Select a Party Type from the drop-down menu.
- 3. Select an Entity Type from the drop-down menu (Individual or Organization).

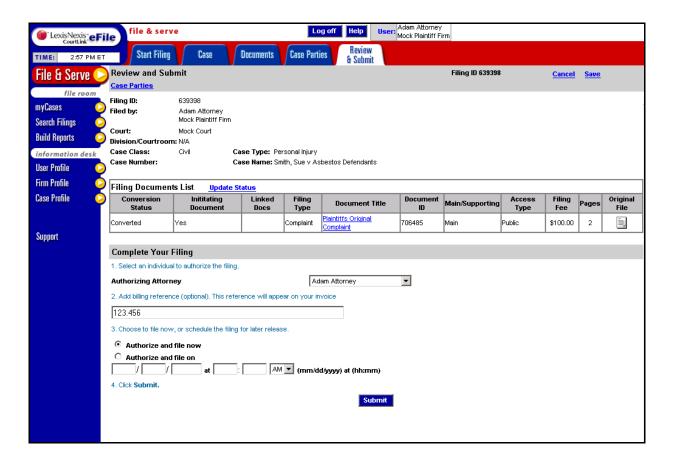
## NOTE: When adding a new party, follow these simple rules:

- Do not include "The" in company names
- Use "&" instead of the word "and"
- Avoid punctuation in company names
- Always abbreviate Inc., Corp., Co.
- If you want to add aliases (dba's and aka's), add them as separate parties
- Place a space between parties with Initials in the name (i.e. A W Chesterson, A P Green, A I S Insurance)
  - 4. Search for or Enter the party name in the fields available (see Search Steps above).
  - 5. Click Save Party. The party name appears in the Party List on the right.
  - 6. To add another new party, click **Add New Party**.

## NOTE: Designating an attorney to represent Additional Parties is not required.

- 7. To remove or edit a party, click the name on the Party List, then remove the party or make edits and save the changes.
- 8. Click the Review and Submit tab.

## FILE & SERVE: REVIEW AND SUBMIT



## AUTHORIZING AND SUBMITTING THE FILING

- 1. Check all information on the filing summary.
- 2. Make any changes to the filing on the appropriate tab; then return to the *Review and Submit* page.
- 3. From the drop down menu select the name of the individual authorizing the filing.
- 4. Enter any billing information you wish to appear on your invoice.
- 5. You can choose to authorize and file your documents now, or you may choose to enter a future date and time for the document to be submitted.
- 6. Click Submit.
- 7. A CourtLink eFiling receipt appears containing your date and time of filing "stamp", print a copy for your records.

Once the Court Clerk reviews the filing, you will receive an email containing the case number, judge assignment, and other pertinent information. Remember to complete Service of Process traditionally. For more information on Service of Process of e-filed documents, contact your account manager.